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# FOREIGN AGRICULTURE CIRCULAR

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## WORLD WOOL BALANCE INTERNATIONAL WOOL STUDY GROUP REVIEW

World wool statistics compiled by the Department of Agriculture have contributed to and in turn have been assisted by reports of the International Wool Study Group. The latest review of the world wool situation by the Study Group was released following its fifth meeting, November 3-6, 1952. The statistical review which begins on page 5 is reproduced as a service to United States Wool interests. Some differences exist between these statistics and those published by the United States Department of Agriculture, the chief difference resulting from the manner in which Northern and Southern Hemisphere clips are combined into seasonal totals.

From the two sources of material the following supply and disposition table is presented in an attempt to summarize the world apparel wool picture in terms of production of raw wool.

APPAREL WOOL: Estimated world supply and disposition, average 1934-39 and 1940-45; and annual 1945-46 through 1952-53 season (grease basis)

| Year 1/      | Supply    |            |           | Disposition |           |
|--------------|-----------|------------|-----------|-------------|-----------|
|              | Carry-in  | Production | Total     | Consumption | Closing   |
|              | stocks    |            |           |             | stock     |
|              | Mil. lbs. | Mil. lbs.  | Mil. lbs. | Mil. lbs.   | Mil. lbs. |
| 1934-39 avg. | 1,825     | 2,991      | 4,816     | 3,103       | 1,713     |
| 1940-45 avg. | 2,961     | 3,291      | 6,252     | 2,580       | 3,672     |
| 1945-46      | 5,357     | 2,964      | 8,321     | 3,299       | 5,022     |
| 1946-47      | 5,022     | 2,982      | 8,004     | 3,530       | 4,474     |
| 1947-48      | 4,474     | 2,931      | 7,408     | 3,854       | 3,551     |
| 1948-49      | 3,551     | 2,965      | 6,516     | 3,528       | 2,988     |
| 1949-50      | 2,988     | 3,100      | 6,088     | 3,960       | 2,128     |
| 1950-51      | 2,128     | 3,115      | 5,243     | 3,384       | 1,859     |
| 1951-52      | 1,859     | 3,190      | 5,049     | 3,060       | 1,989     |
| 1952-53      | 1,989     | 3,320      | 5,309     | 3,300       | 2,009     |
| 1953-54      | --        | 3,360      | --        | --          | --        |
| 1954-55      | --        | 3,400      | --        | --          | --        |

Data for 1934-35 through 1947-48 from Foreign Agriculture Report No. 48, April 1950. Production forecast made by this Office.

1/ Stocks are for July 1; Consumption applies to calendar year beginning halfway through the season; i.e. 1951-52 refers to consumption in 1952.

Office of Foreign Agricultural Relations. 2/3/53



## BACKGROUND

The International Wool Study Group was created pursuant to a resolution adopted at the International Wool Talks, held at London during November of 1946, in which the United States and 12 other governments participated. Its functions are to make studies of the world wool position, provide continuous information regarding actual and prospective supply and demand, consider possible solutions to problems which are unlikely to be solved by the ordinary developments of world trade in wool, and formulate and transmit recommendations to the participating governments. United States participation in the group was authorized by President Truman's letter of March 11, 1946 to Senator O'Mahoney, which expressed the hope that the responsible executive agencies of the United States would consult with foreign wool agencies to provide for a mutual understanding of objectives and activities in selling policies.

The first meeting was held in London in March of 1947 with 25 countries, representing both producers and consumers of wool, present, and subsequent meetings were held in London, October 4-6, 1948, November 7-9, 1949, October 2-10, 1950 and November 3-6, 1952. The Study Group operates without a paid Secretariat, depending upon a management committee, made up of representatives of major wool producing or consuming countries resident in London, to conduct the affairs of the organization, set date and place of meetings and publish a quarterly report of statistics to member governments.

In general the Study Group reviews the world wool position and the problems that have arisen in connection with production, trade and consumption of wool, and makes recommendation to governments for action. The spirit of cooperation and mutual understanding of producing and consuming countries generated by the Wool Study Group meetings did much to achieve orderly disposal of the large World War II wool surplus without unduly upsetting the market. World wool statistics have improved considerably with the insistence of the Group that minimum standards be maintained by member countries and the quarterly report on statistics is of considerable value to member countries. The existence of the Group also provided an excellent forum for this government to use in considering the problems of shortage in 1950 and the impact of the preparedness program on the wool industry.

The Department of Agriculture has been assisted in carrying out this phase of the government's wool program by other interested agencies of the government and by grower and trade organization. In past years the U. S. delegation has included officials of the Department of Agriculture, State, Commerce, and Defense as well as industry advisors. The delegation to the 1952 meeting was made up of Eric Englund, Agricultural Attache, American Embassy, London and Eugene T. Ransom, Office of Foreign Agricultural Relations, Department of Agriculture.



## INTERNATIONAL WOOL STUDY GROUP

### Fifth Meeting

#### FINAL PRESS RELEASE

From November 3rd to November 6th representatives from Argentina, Australia, Belgium, Brazil, Canada, Chile, Denmark, Dominican Republic, Egypt, Federal Republic of Germany, Finland, France, India, Israel, Italy, Japan, Netherlands, New Zealand, Norway, Pakistan, Poland, Portugal, Republic of Ireland, Spain, Sweden, Switzerland, Turkey, Union of South Africa, United Kingdom, United States, and Yugoslavia, together with observers from the Commonwealth Economic Committee, Food and Agriculture Organization, International Wool Secretariat, International Wool Textile Organization, and the Organization for European Economic Co-operation have taken part in the Fifth Meeting of the International Wool Study Group at Church House, Westminster.

The Wool Study Group have carried out a review of the world wool situation over the two years which have elapsed since the Fourth Meeting of the Group in 1950. Statements were received from the various delegations regarding the wool position in their several countries with special reference to problems arising and developments of international interest. The Group's assessment of the statistical situation is as follows.

World production of virgin wool in 1951/52 (July-June) amounted to approximately 2,290 million lbs. clean, but an increase in carry-over stocks in producing countries at the end of the season reduced total disposals to 2,185 million lbs. Stocks in Argentina and Uruguay are estimated to have increased by 175 million lbs. clean, while in contrast the New Zealand carry-over of 70 million lbs. accumulated during the 1950/51 season was liquidated during 1951/52. World consumption of virgin wool during the first nine months of 1952 has been running at an annual rate of 2,200 million lbs. Stocks in consuming countries as a whole (including stocks afloat and strategic reserves) showed little change, so that the approximate balance between consumption and disposals was the result of the build-up of stocks in South America.

Total world production in 1952/53 is forecast on a greasy basis at 4,000 million lbs., compared with 3,935 million lbs. in 1951/52 and with a prewar average of 3,788 million lbs. The Australian clip is expected to show some recovery and is forecast at 1,100 million lbs., greasy, compared with 1,050 million lbs. last season. Both the New Zealand and South African clips have continued to show a moderate increase, and an increase has been recorded in the United States clip for the first time for over ten years; it rose from 259 million lbs. in 1951 to 270 million lbs. in 1952, though this revival may not continue. Only small changes are expected in other countries. Practically the whole of the increase in world production indicated in these figures is expected to consist of crossbred wool, merino production remaining unchanged.

World consumption of wool declined almost continuously from the first quarter of 1950, though there was a moderate but temporary recovery in the last quarter of that year. It reached a low point in the third quarter of

1951, and since then consumption has risen steadily, though modestly. This trend has been experienced by most of the major consuming countries. The most important exception is Japan, whose consumption has continued to rise throughout 1950, 1951 and 1952, although in 1951 consumption was still approximately only 60 percent of that in 1937.

In the third quarter of this year world consumption had reached an annual rate of 2,260 million lbs., compared with an annual rate of 2,050 million lbs. at the low point in the third quarter of 1951. This increase in wool consumption does not, however, indicate any increase in the total amount of materials used in the wool textile industry. It was off-set by an approximately equivalent reduction in the use of materials other than virgin wool.

The world clip for 1952/53 is provisionally estimated at 2,325 million lbs. clean, so that only a relatively small further increase in current consumption would lead to a balance between world production and consumption. In addition to the current world clip, however, there is the large carry-over stock in South America, which at the end of last season appeared to be some 200 million lbs. clean in excess of normal. This could thus make total available supplies over 2,500 million lbs. On the other hand the British Government has already announced its intention to continue buying for the strategic stockpile during the 1952/53 season at approximately the same average rate as has applied since the stockpiling operation began, (understood to be 50/60 million lbs. clean annually). Other countries have not supplied any information of this kind.

Stocks in importing countries, including strategic reserves and stocks afloat; are estimated to have amounted to 840 million lbs. clean at the end of 1951, representing  $4\frac{1}{2}$  months' supply at the then current rate of consumption. Current stocks are estimated at just over 4 months' supply at the higher rate of consumption now prevailing.

The Group have taken note of the very effective work performed by their Technical Committee and Management Committee in the collection and prompt circulation to members of up-to-date quarterly reports on the world wool situation. They recognize the great importance in present circumstances of reliable statistics on wool, and they have noted with much pleasure the steady improvement in the standard of the statistics which have been made available to them.



## SURVEY OF THE WORLD WOOL POSITION

Eighth Quarterly Report of the Technical Committee  
on the World Wool Situation for the Quarter ended 30th September, 1952,  
(with a review of the Two Year Period since  
the Fourth Meeting of the Group) 1/

### GENERAL POSITION

The quarterly statistics currently made available to the International Wool Study Group by the joint services of the International Wool Textile Organization and Commonwealth Economic Committee indicate the developments that have taken place in the world wool situation. When the season's wool clip is compared with consumption in the calendar year beginning half way through the season (to allow for time-lag in shipping, etc.), it will be seen that available supplies in 1951/52 amounted to 2,183 million lbs. (clean) whereas world mill consumption for 1952 is forecast at around 2,200 million lbs. The latter forecast is based on the first nine months of the year. This virtual balance in supply and consumption was achieved by the increase in stocks of wool held in the South American wool producing countries. Stocks in Argentina and Uruguay are estimated to have increased by 175 million lbs. (clean) while, in contrast, the New Zealand carry-over of 70 million lbs. was liquidated during the season. Hence 105 million lbs. of the 1951/52 clip of 2,288 million lbs. (clean) went into stock in the producing countries.

The world clip for 1952/53 is provisionally estimated at 2,325 million lbs. clean, so that only a relatively small further increase in current consumption would lead to a balance between world production and consumption. In addition to the current world clip, however, there is the large carry-over stock in South America, which at the end of last season appeared to be some 200 million lbs. clean in excess of normal. This could thus make total available supplies over 2,500 million lbs. On the other hand the British Government has already announced its intention to continue buying for the strategic stockpile during the 1952/53 season at approximately the same average rate as has applied since the stockpiling operation began (understood to be 50/60 million lbs. clean annually).

1/ Statistics presented are based largely on results of questionnaires issued jointly by the Commonwealth Economic Committee and the International Wool Textile Organization. The Wool Study Group cooperates in the joint venture by encouraging improvement in country statistics through its minimum standard of statistics, its technical and management committees which compile and pass on the quarterly data, and through its annual meeting where statements from member countries are received and the spirit of international cooperation inspired.

Stocks in importing countries including strategic reserves and stocks afloat are estimated to have amounted to 840 million lbs. (clean) at the end of 1951, representing  $4\frac{1}{2}$  months' supply at the current rate of consumption. During 1952 these stocks tended to decline, and at the end of the year they are expected to be just over 4 months' supply at the prevailing rate of consumption.

Although the current selling season opened rather cautiously, a firmer tone soon developed and prices rose slowly but constantly. By 25th October Merino 64's were quoted at 134d. a lb. which was back to their level of April, 1950. The peak reached during the Korean boom was 314d. a lb. (monthly average) in March, 1951 and the subsequent low point was 110d. a lb. (monthly average) in March of this year.

### World Consumption of Virgin Wool

The recovery in world consumption of virgin wool continued in the third quarter of 1952 despite the incidence of holidays, and although the increase was again modest it was the fourth successive one to be recorded. Aggregate consumption in the eleven main consuming countries, United States, United Kingdom, France, Federal Republic of Germany, Italy, Japan, Australia, Belgium, Canada, Netherlands and Sweden, amounted to 380 million lbs. (clean) compared with 372 million lbs. in the previous quarter and 338 million lbs. in the third quarter of 1951. All the major consuming countries except France and Italy experienced this recovery in wool consumption during the third quarter. It should be noted that this increase in wool consumption has been accompanied by an almost equal fall in the consumption of other materials.

On the basis of the quarterly figures world consumption reached its peak in the first quarter of 1950. Subsequently it declined almost continuously (though there was a moderate recovery in the last quarter that year) and reached a low point in the third quarter of 1951. Since then consumption has risen once more. This trend has been experienced by most of the major consuming countries. The two important exceptions were Germany (which reached peak consumption in the fourth quarter of 1950) and Japan, where consumption continued to rise throughout 1951 and 1952.

The United States has retained its position as the world's largest consumer of virgin wool with the United Kingdom as the second largest. France is third and Germany and Japan virtually share the fourth place and are followed closely by Italy. Despite the recovery in consumption in the third quarter of this year, only one country, Japan, consumed more virgin wool than in any quarter of 1951.

The six-monthly figures, perhaps, give a better indication of the significance of the present recovery in world wool consumption. In the first half of 1951 the world total was 1,230 million lbs. (clean) which fell to 1,020 million lbs. in the second half of that year. In the first six months of 1952 it recovered to 1,070 million lbs. and in the second six months it is forecast at 1,130 million lbs. this forecast is based on data for the third quarter, allowing for a further small increase in the fourth quarter.



## Consumption of Materials other than Virgin Wool

The consumption of other materials, noils, waste, broken tops, recovered and re-used wool, shoddy or mungo, artificial fibres, hair, cotton and silk, by the wool textile industry continued to fall in the third quarter. Aggregate consumption of the ten major consuming countries is put at 212½ million lbs. compared with a revised total of 221½ million lbs. for the second quarter. Peak consumption of 301½ million lbs. was reached in the second quarter of 1951. Since then, consumption has declined almost continuously each quarter (it recovered somewhat in the fourth quarter of 1951).

Consumption of other materials in the United States during the third quarter is believed to have fallen modestly, while in the United Kingdom it increased quite significantly. In Italy and France, consumption declined but it increased in Germany, Belgium and the Netherlands.

## Total Consumption of Materials

Total consumption of materials (virgin wool plus other materials) by the ten countries remained practically unchanged in the third quarter compared with the previous three months; the increase in the consumption of virgin wool was virtually offset by the fall in the use of other materials. Total consumption has in fact remained almost stable since the fourth quarter of 1951.

The proportion of virgin wool to total materials used however has tended to increase this year. As the following table shows, it amounted to 63½ per cent in the third quarter compared with 62 percent in the second, 61 percent in the first and 58 percent in the last three months of 1951. It was in fact the highest proportion recorded since the fourth quarter of 1950.

## Virgin Wool as a proportion of total materials consumed in ten major consuming countries

|             | : | : Total materials (virgin<br>: wool plus other materials)<br>: million lbs. |         |        | : | : Virgin wool as percent-<br>: age of total materials |        |        |
|-------------|---|---|---------|--------|---|---|--------|--------|
|             | : | 1950  | : 1951  | : 1952 | : | 1950  | : 1951 | : 1952 |
| 1st Quarter | : | 724   | : 722   | : 580  | : | 68  | : 60   | : 61   |
| 2nd Quarter | : | 704   | : 707   | : 585  | : | 66  | : 57   | : 62   |
| 3rd Quarter | : | 706   | : 567   | : 584* | : | 65  | : 57   | : 63½* |
| 4th Quarter | : | 749   | : 591   | :      | : | 64  | : 58   | :      |
| Year        | : | 2,884   | : 2,567 | :      | : | 66  | : 58   | :      |

\* Provisional

Notes: (1) These ten countries accounted for two-thirds of the world consumption of virgin wool in 1951.

(2) In the figures of consumption of total materials there is a certain element of unavoidable double-counting owing to the inclusion of noils and reprocessed wool. It is however considered that the total provides a useful indication of the level of activity in the wool textile industry.

## World Production of Virgin Wool

The first provisional estimate for the world wool clip for 1952/53 is put at 4,000 million lbs. (greasy) or 2,325 million lbs. (clean), representing an increase of  $1\frac{1}{2}$  percent on the 1951/52 total of 3,936 million lbs. (greasy) or 2,288 million lbs. (clean). Larger clips are forecast from Australia (450 million lbs. or 5 percent (greasy)) New Zealand (48 million lbs. or 2 percent (greasy)) and the United States (41 million lbs. or 4 percent (greasy)). The Uruguayan clip is forecast to decline by 5 million lbs. (greasy) or 3 percent. Argentina, South Africa and the United Kingdom have shown little or no change.

World production of merino wool this season is not expected to show any appreciable change from last season's total of 1,317 million lbs. (greasy), but crossbred production should increase from 1,780 million lbs. (greasy) to 1,835 million lbs. The output of carpet-type wool (non-apparel) is estimated at 850 million lbs. (greasy) compared with 839 million lbs. in 1951/52.

## Exports of Wool

Total exports of virgin wool from the five major exporting countries amounted to 1,056 million lbs. (clean), in the season 1951/52 (July-June). In the previous season the total was 1,193 million lbs., and in 1949/50 it amounted to 1,410 million lbs., excluding J.O. transfers in each case. Compared with the two earlier seasons, therefore, the 1951-52 total showed a decline of 11 percent and 25 percent respectively.

The main factor in the fall in 1951/52 was, of course, the drastic reduction in shipments from South America. The Argentine and Uruguayan exports were less than one-fifth of those of the previous twelve months; they amounted, in all, to some 44 million lbs. clean content, compared with 269 million lbs. a year earlier and 335 million lbs. in 1949-50. (Exports of tops are excluded in all cases). As is widely understood, the effect of Government restrictions on exports and the operation of differential exchange rates was largely responsible for the low level of shipments. Since the end of June, 1952, as a result of some relaxation of these restrictions and the modification of the Argentine Exchange rate, there has been a considerable increase in the volume of raw wool shipments from South America.

Exports from New Zealand in contrast, showed an increase of over 75 percent compared with 1950/51. The fluctuations in New Zealand exports between the two seasons were, however, very largely a result of the hold-up in shipments caused by the waterfront strike, which extended from mid-February to the early summer of 1951. As a consequence exports in 1950/51 were unduly low, while in the following twelve months they were correspondingly inflated by the back log from the previous season.

Exports from Australia totalled 565 million lbs. clean, during the season 1951/52 and were 10 percent less than in 1950/51, partly owing, it would appear, to the smaller clip last season. South African exports, on the other hand, at 116 million lbs. were 6 percent higher than a year earlier.



## Imports of Wool

Retained imports of virgin wool (excluding wool on the skin) in the nine principal importing countries, United States, United Kingdom, France, Japan, Italy, Federal Republic of Germany, Belgium, Canada and Netherlands, totalled approximately 640 million lbs. clean, in the first six months of 1952, representing a decline of 4 percent on the corresponding 1951 quantity and of 19 percent compared with the first half of 1950. The principal cause of the fall compared with last year was the substantial reduction of 27 percent in United States' imports, though German, Belgian and Canadian imports also declined. Imports into the United Kingdom increased by 18 percent, though they were not as large as in the first half of 1950. French and Italian imports also increased and were in fact larger than in 1950. Details for Japan are available only for the first three months of 1952, in which period they were 29 percent greater than in the corresponding months of last year and nearly twice the comparable 1950 quantity.

Although imports in the first half of this year were smaller than in the first half of 1951 this does not necessarily mean that total imports for the year will be less than last year's figure of 1,078 million lbs. (clean). In the second half of 1951 imports were abnormally small. This year on the other hand imports are likely to increase, particularly from South America.

The trends in imports into the individual countries are of course largely a reflection of the trends in wool consumption in those countries, these have already been referred to under the section on wool consumption. The United Kingdom is an important exception, having imported this year a substantial quantity of wool for strategic reserves in addition to wool for commercial use.

## Prices

The 1952/53 wool selling season began on the 1st September with auctions in Australia and South Africa. The market opened on a cautious note, with prices about 10d. per lb. (clean) cheaper than at the close of the July series of London sales, but from the middle of September it became slowly but steadily stronger until by the 25th of October merino 64's stood at 134d. per lb. and were within 2d. of their July level. The market for crossbreds will not be fully tested until after the New Zealand sales begin in the middle of November, but at the September series in London the offerings of New Zealand crossbreds were cleared at prices fully firm on the July close.

Wool prices over the past season and during the present one have indeed remained reasonably stable compared with the spectacular fluctuations of 1950/51. Since September 1951 merino 64's, on a monthly average basis, have shown a maximum variation of 42d. per lb. whereas during the 1950/51 season the maximum variation was 145d. and in 1949/50 63d. per lb. Merino 64's averaged 131d per lb. in October this year compared with 152d. in October, 1951. At their peak in March, 1951 they averaged 314d while immediately before the outbreak of the Korean war in June, 1950 they were 140d. per lb. and 202d. in October, 1950. Medium crossbred 50's showed a maximum range of 34d. per lb. since September last year compared with 121d. in 1950/51 and 34d. in 1949/50.

TABLE I (a) - World Balance sheet for virgin wool  
million lbs. - clean basis

|                                 | :1945  | :1946  | :1947  | :1948  | :1949  | :1950  | :1951    | : 1952                 |
|---------------------------------|--------|--------|--------|--------|--------|--------|----------|------------------------|
|                                 | : -46  | : -47  | : -48  | : -49  | : -50  | : -51  | : -52    | : -53                  |
| World clip                      | :2,110 | :2,125 | :2,100 | :2,150 | :2,199 | :2,277 | :2,288   | :(2,325                |
| Plus off-take from, or          | :      | :      | :      | :      | :      | :      | :        | :                      |
| less addition to,               | : /897 | : /252 | : /398 | : /118 | : /441 | : -22  | : -105   | : /200 <sub>b</sub>    |
| supply stocks                   | :      | :      | :      | :      | :      | :      | :        | :                      |
| Total supply                    | :3,007 | :2,377 | :2,498 | :2,268 | :2,640 | :2,255 | :2,183   | :(2,525 <sub>c</sub> ) |
| Less world consumption <u>a</u> | :2,259 | :2,443 | :2,547 | :2,440 | :2,669 | :2,257 | :(2,200) | :                      |
| Changes in stocks in            | :      | :      | :      | :      | :      | :      | :        | :                      |
| consuming countries and         | :      | :      | :      | :      | :      | :      | :        | :                      |
| afloat (including               | : /748 | : -66  | : -49  | : -172 | : -29  | : -2   | : -17    | :                      |
| strategic reserves) <u>a</u>    | :      | :      | :      | :      | :      | :      | :        | :                      |
| Stocks in consuming countries:  | :      | :      | :      | :      | :      | :      | :        | :                      |
| at Jan. 1st of second           | :      | :      | :      | :      | :      | :      | :        | :                      |
| year shown (including           | :      | :      | :      | :      | :      | :      | :        | :                      |
| stocks afloat and strat-        | : 410  | :1,158 | :1,092 | :1,043 | : 871  | : 842  | : 840    | : (823)                |
| egic reserves)                  | :      | :      | :      | :      | :      | :      | :        | :                      |

Source: Commonwealth Economic Committee

a During calendar year commencing halfway through the season.

b This figure represents total supply stocks, excluding normal carry-over and strategic reserves, estimated to be available at the beginning of the 1952/53 season.

c This figure represents the maximum supplies likely to be available in 1952/53. It is not implied that they will all be marketed during the season.

Note: Bracket ( ) denotes forecast.



TABLE I (b) - Estimated world supply stocks of virgin wool  
million lbs. - clean basis

| At beginning of season <u>d</u>                                    | :1945   | :1946  | :1947  | :1948  | :1949             | :1950 | :1951             | : 1952 |
|--|---------|--------|--------|--------|-------------------|-------|-------------------|--------|
|  | : -46   | : -47  | : -48  | : -49  | : -50             | : -51 | : -52             | : -53  |
| Joint Organization   | :1,780  | :1,027 | : 809  | : 576  | : 304             | : 84  | : 4               | : -    |
| United States Government <u>a</u>                                  | : 175   | : 240  | : 220  | : 70   | : 55              | : 5   | : -               | : -    |
| United Kingdom Government <u>a</u><br>(British wool)               | : 50    | : 21   | : 7    | : 7    | : 6               | : 5   | : 7               | : 11   |
| Argentina  | : )     | : )    | : )    | : )    | : )               | : )   | : )               | : )    |
|  | : ) 250 | : 70   | : 70   | : 55   | : 175             | : 50  | : 80              | : 200  |
| Uruguay  | : )     | : )    | : )    | : )    | : )               | : )   | : )               | : )    |
|  | : )     | : )    | : )    | : )    | : 25              | : 5   | : 10              | : 65   |
| Excess carry-over in<br>Australia, New Zealand<br>and South Africa | : -     | : -    | : -    | : -    | : 25 <sub>b</sub> | : -   | : 70 <sub>c</sub> | : -    |
| Total  | :2,255  | :1,358 | :1,106 | : 708  | : 590             | : 149 | :171              | : 276  |
| Net change in supply<br>stocks during season                       | : -897  | : -252 | : -398 | : -118 | : -441            | : -22 | : -105            |        |

Source: Commonwealth Economic Committee and U.K. - Dominion Wool  
Disposals Ltd.

a Excluding strategic reserves.

b All in Australia.

c All in New Zealand.

d At July 1st for all except Argentina and Uruguay, which are  
October 1st.

TABLE II - Estimated world consumption of virgin wool

million lbs., - clean basis

|   | 1949  | 1950  | 1951  | 1950      |           |           |           | 1951      |           |           |           | 1952      |           |           |           | January-September |      |
|---|-------|-------|-------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-------------------|------|
|   |       |       |       | 1st. Qtr. | 2nd. Qtr. | 3rd. Qtr. | 4th. Qtr. | 1st. Qtr. | 2nd. Qtr. | 3rd. Qtr. | 4th. Qtr. | 1st. Qtr. | 2nd. Qtr. | 3rd. Qtr. | 4th. Qtr. | 1951              | 1952 |
| Countries reporting on a quarterly basis:-          |       |       |       |           |           |           |           |           |           |           |           |           |           |           |           |                   |      |
| United States <sup>g</sup> in wool textile industry |       |       |       |           |           |           |           |           |           |           |           |           |           |           |           |                   |      |
| Apparel   | 339   | 437   | 382   | 110.0     | 105.3     | 114.2     | 107.6     | 99.0      | 112.4     | 88.3      | 82.5      | 78.0      | 82.8      | (90.0)    | 299.7     | 250.8             |      |
| Carpet  | 161   | 198   | 102   | 51.7      | 51.8      | 44.3      | 50.0      | 43.8      | 26.3      | 10.5      | 21.5      | 30.0      | 24.7      | (25.0)    | 80.6      | 79.7              |      |
| Other <sup>c</sup>                                  | (11)  | (12)  | (10)  | (2.0)     | (3.0)     | (4.0)     | (3.0)     | (3.0)     | (3.0)     | (2.0)     | (2.0)     | (2.0)     | (2.0)     | (2.0)     | (8.0)     | (6.0)             |      |
| Total   | 511   | 647   | 494   | 163.7     | 160.1     | 162.5     | 160.6     | 145.8     | 141.6     | 100.8     | 105.9     | 110.0     | 109.5     | (117.0)   | 388.2     | 336.5             |      |
| United Kingdom                                      | 492   | 518   | 397   | 139.6     | 129.0     | 124.4     | 125.0     | 116.7     | 108.1     | 90.9      | 80.9      | 85.9      | 85.2      | 92.5      | 315.7     | 263.6             |      |
| France  | 262   | 254   | 198   | 76.0      | 62.5      | 52.1      | 63.6      | 56.2      | 51.5      | 42.5      | 47.4      | 52.1      | 54.9      | 46.8      | 150.2     | 153.8             |      |
| Germany (Fed. Rep.)                                 | 91    | 128   | 117   | 30.8      | 28.5      | 31.7      | 36.5      | 33.5      | 28.3      | 25.7      | 29.4      | 29.0      | 26.6      | 28.7      | 87.5      | 84.3              |      |
| Italy   | 119   | 126   | 97    | (30.0)    | (30.0)    | 33.0      | 33.0      | 27.6      | 22.0      | 17.6      | 29.8      | 24.3      | 28.7      | 26.5      | 67.2      | 79.5              |      |
| Japan   | 16    | 51    | 80    | 8.6       | 11.4      | 14.9      | 16.3      | 15.1      | 19.8      | 21.7      | 23.6      | 23.8      | 29.5      | h         | 56.6      | h                 |      |
| Australia <sup>d</sup>                              | 71e   | (60)  | 56    | h         | h         | h         | h         | 12.8      | 14.9      | 15.1      | 12.8      | 9.5       | 8.6       | h         | 42.8      | h                 |      |
| Belgium <sup>f</sup>                                | 71    | 80    | 61    | 20.9      | 18.0      | 19.6      | 21.6      | 21.2      | 17.8      | 11.4      | 10.3      | 10.3      | 12.9      | 13.6      | 50.4      | 36.8              |      |
| Canada  | 34    | 33    | 24    | 8.1       | 8.1       | 7.8       | 8.6       | 6.5       | 6.4       | 5.1       | 6.0       | 6.5       | 6.9       | 6.4       | 18.0      | 19.8              |      |
| Netherlands <sup>g</sup>                            | 40    | 37    | 23    | 10.8      | 9.2       | 8.3       | 8.7       | 7.3       | 5.9       | 4.5       | 5.7       | 6.1       | 6.1       | 6.6       | 17.7      | 18.8              |      |
| Sweden  | 25    | 22    | 15    | h         | h         | h         | h         | 4.5       | 4.3       | 3.1       | 3.0       | 2.9       | 2.9       | h         | 11.9      | h                 |      |
| Total (11 countries)                                | 1,732 | 1,956 | 1,562 | 509.2     | 478.0     | 475.8     | 492.9     | 447.2     | 420.6     | 338.4     | 354.8     | 360.4     | 371.8     | 380.0     | 1,206.2   | 1,112.0           |      |
| Other countries                                     | 708   | 713   | 695   |           |           |           |           |           |           |           |           |           |           |           |           |                   |      |
| World Total   | 2,440 | 2,669 | 2,257 |           |           |           |           |           |           |           |           |           |           |           |           |                   |      |

Note: Figures in brackets represent Study Group estimates in the absence of full returns from reporting countries.

<sup>a</sup> Provisional. <sup>b</sup> Revised. <sup>c</sup> Consumption in cotton and other spinning systems, and estimated consumption in batting and felt manufacture. <sup>d</sup> The 1951 and 1952 figures include estimated consumption in felt-making (0.5 million lbs. per quarter) in order to make them comparable with earlier years. Consumption in felt-making is reported only on a fiscal year basis (July-June). <sup>e</sup> Fiscal year ending June of year shown. This figure is provisional and is likely to be revised downwards. <sup>f</sup> Revised throughout, to include estimated consumption in blanket and felt-manufacture. <sup>g</sup> 1951 figures revised. <sup>h</sup> Not available; estimate included in total

Source: Commonwealth Economic Committee/International Wool Textile Organization.



TABLE III - Consumption of materials other than virgin wool in the wool-textile industries of the principal consuming countries

(noils; waste; broken tops; recovered and re-used wool; shoddy or mungo; artificial fibres; hair; cotton; silk)

Million lbs.

|                            | 1949         |       |       |           | 1950      |           |           |           | 1951      |           |           |           | 1952      |           |           |       | January-September |  |
|----------------------------|--------------|-------|-------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-------|-------------------|--|
|                            | 1949         | 1950  | 1951  | 1st. Qtr. | 2nd. Qtr. | 3rd. Qtr. | 4th. Qtr. | 1st. Qtr. | 2nd. Qtr. | 3rd. Qtr. | 4th. Qtr. | 1st. Qtr. | 2nd. Qtr. | 3rd. Qtr. | 4th. Qtr. | 1951  | 1952              |  |
|                            |              |       |       |           |           |           |           |           |           |           |           |           |           |           |           |       | a                 |  |
| United States <sup>c</sup> | 259.6        | 290.6 | 268.5 | 65.0      | 73.1      | 77.7      | 74.9      | 77.1      | 75.8      | 56.0      | 59.6      | 61.6      | 61.9      | (58.5)    |           | 208.9 | 182.0             |  |
| United Kingdom             | 152.5        | 167.8 | 178.8 | 41.6      | 41.4      | 40.0      | 44.8      | 46.1      | 49.1      | 42.9      | 40.7      | 38.0      | 33.2      | 36.8      |           | 138.1 | 108.0             |  |
| Italy                      | 123.0        | 153.0 | 167.4 | (37.0)    | (37.0)    | (39.5)    | (39.5)    | 47.5      | 44.0      | 37.5      | 38.4      | 30.9      | 32.2      | 28.7      |           | 129.0 | 91.8              |  |
| Germany (Fed. Rep.)        | <sup>c</sup> | 109.3 | 143.6 | (26.3)    | (24.3)    | (27.2)    | (31.5)    | 26.6      | 38.5      | 38.9      | 39.8      | 29.4      | 23.3      | 24.3      |           | 104.0 | 77.0              |  |
| France                     | 99.7         | 117.4 | 140.2 | 27.2      | 29.6      | 26.3      | 34.3      | 38.7      | 39.3      | 28.6      | 33.6      | 30.7      | 29.6      | 22.2      |           | 106.6 | 82.5              |  |
| Japan                      | 44.2         | 66.2  | 96.6  | 12.6      | 15.7      | 16.1      | 21.8      | 26.8      | 29.6      | 21.5      | 18.7      | 20.4      | 24.0      | f         |           | 77.9  | f                 |  |
| Canada                     | 32.1         | 24.7  | 25.5  | 6.2       | 6.1       | 5.9       | 6.5       | 7.3       | 6.6       | 5.4       | 6.2       | 6.3       | 5.9       | 5.9       |           | 19.3  | 18.1              |  |
| Sweden                     | 19.2         | 20.1  | 23.0  | f         | f         | f         | f         | 6.0       | 6.4       | 5.4       | 5.3       | 4.7       | 4.1       | f         |           | 17.8  | f                 |  |
| Belgium <sup>e</sup>       | 14.2         | 18.7  | 18.5  | 4.6       | 4.6       | 4.0       | 5.4       | 6.0       | 6.4       | 3.5       | 2.7       | 2.8       | 3.2       | 3.4       |           | 15.9  | 9.4               |  |
| Netherlands <sup>e</sup>   | 19.0         | 19.8  | 18.6  | 4.5       | 4.9       | 4.8       | 5.7       | 5.3       | 5.7       | 3.5       | 4.1       | 4.1       | 4.1       | 4.7       |           | 14.5  | 12.9              |  |
| Total                      | 764d         | 988   | 1,081 | 229.6     | 241.8     | 246.3     | 270.0     | 287.4     | 301.4     | 243.2     | 249.1     | 228.9     | 221.5     | 212.5g    |           | 832.0 | 663.0             |  |

Note: Figures in brackets represent Study Group estimates in the absence of full returns from reporting countries.

<sup>a</sup> Provisional

<sup>b</sup> Revised

<sup>c</sup> Not available

<sup>d</sup> Excluding Germany

<sup>e</sup> 1951 figures revised

<sup>f</sup> Not available; estimate included in total

<sup>g</sup> Assuming no change in Japan compared with previous quarter

Source: Commonwealth Economic Committee/International Wool Textile Organization.

TABLE IV - Estimated world production of virgin wool

million lbs. - greasy basis

|                        | : 1941-42 :          |       | : 1948-49: |       | : 1949-50: |       | : 1950-51: |         | : 1951-52: |         | : 1952-53  |         |
|------------------------|----------------------|-------|------------|-------|------------|-------|------------|---------|------------|---------|------------|---------|
|                        | : Average (peak war: |       | : 1948-49: |       | : 1949-50: |       | : 1950-51: |         | : 1951-52: |         | : 1952-53  |         |
|                        | : 1934-38:           |       | : year):   |       | : :        |       | : :        |         | : <u>a</u> |         | : <u>b</u> |         |
| Argentina              | : 376 :              | 497   | : 425 :    | 415   | : 430 :    | 420   | : 420 :    | 420     | : 420 :    | 420     | : 420 :    | 420     |
| Australia              | : 995 :              | 1,167 | : 1,030 :  | 1,111 | : 1,093 :  | 1,050 | : 1,050 :  | 1,100   | : 1,050 :  | 1,100   | : 1,050 :  | 1,100   |
| New Zealand            | : 300 :              | 345   | : 367 :    | 390   | : 390 :    | 407   | : 407 :    | 415     | : 407 :    | 415     | : 407 :    | 415     |
| South Africa <u>c</u>  | : 261 :              | 269   | : 227 :    | 225   | : 240 :    | 248   | : 248 :    | 250     | : 248 :    | 250     | : 248 :    | 250     |
| United Kingdom         | : 111 :              | 98    | : 81 :     | 88    | : 89 :     | 88    | : 88 :     | 90      | : 88 :     | 90      | : 88 :     | 90      |
| United States <u>d</u> | : 451 :              | 475   | : 296 :    | 264   | : 259 :    | 259   | : 259 :    | 270     | : 259 :    | 270     | : 259 :    | 270     |
| Uruguay                | : 114 :              | 117   | : 144 :    | 163   | : 183 :    | 180   | : 180 :    | 175     | : 180 :    | 175     | : 180 :    | 175     |
| Other countries        | : 1,180 :            | 1,279 | : 1,201 :  | 1,179 | : 1,241 :  | 1,284 | : 1,284 :  | 1,305   | : 1,284 :  | 1,305   | : 1,284 :  | 1,305   |
| Total                  | : 3,788 :            | 4,247 | : 3,771 :  | 3,835 | : 3,925 :  | 3,936 | : 3,936 :  | 4,000 * | : 3,936 :  | 4,000 * | : 3,936 :  | 4,000 * |
| Of which:              | :                    | :     | :          | :     | :          | :     | :          | :       | :          | :       | :          | :       |
| Merino                 | : 1,475 :            | 1,661 | : 1,302 :  | 1,343 | : 1,351 :  | 1,317 | : 1,317 :  | 1,315   | : 1,317 :  | 1,315   | : 1,317 :  | 1,315   |
| Crossbred              | : 1,518 :            | 1,726 | : 1,663 :  | 1,704 | : 1,750 :  | 1,780 | : 1,780 :  | 1,835   | : 1,780 :  | 1,835   | : 1,780 :  | 1,835   |
| Total apparel          | : 2,993 :            | 3,387 | : 2,965 :  | 3,047 | : 3,101 :  | 3,097 | : 3,097 :  | 3,150   | : 3,097 :  | 3,150   | : 3,097 :  | 3,150   |
| Other                  | : 795 :              | 860   | : 806 :    | 788   | : 824 :    | 839   | : 839 :    | 850     | : 839 :    | 850     | : 839 :    | 850     |
| Clean                  | :                    | :     | :          | :     | :          | :     | :          | :       | :          | :       | :          | :       |
| equivalent:            | :                    | :     | :          | :     | :          | :     | :          | :       | :          | :       | :          | :       |
| Merino                 | : 693 :              | 814   | : 678 :    | 707   | : 731 :    | 713   | : 713 :    | 710     | : 713 :    | 710     | : 713 :    | 710     |
| Crossbred              | : 965 :              | 1,087 | : 1,069 :  | 1,098 | : 1,134 :  | 1,155 | : 1,155 :  | 1,190   | : 1,155 :  | 1,190   | : 1,155 :  | 1,190   |
| Total apparel          | : 1,658 :            | 1,901 | : 1,747 :  | 1,805 | : 1,865 :  | 1,868 | : 1,868 :  | 1,900   | : 1,868 :  | 1,900   | : 1,868 :  | 1,900   |
| Other                  | : 400 :              | 430   | : 403 :    | 394   | : 412 :    | 420   | : 420 :    | 425     | : 420 :    | 425     | : 420 :    | 425     |
| Total                  | : 2,058 :            | 2,331 | : 2,150 :  | 2,199 | : 2,277 :  | 2,288 | : 2,288 :  | 2,325   | : 2,288 :  | 2,325   | : 2,288 :  | 2,325   |

a Provisional.

b Forecast

c Including Basutoland and S.W. Africa Territory.

d Pulled wool converted to a greasy basis.

\* This figure is the rounded total of the individual countries.

Source: Commonwealth Economic Committee



TABLE V - Exports of raw wool from the chief exporting countries  
(excluding wool on the skin)

(b) Estimated clean weight - million lbs.

|                              | Season <u>a</u> |         |         |                | 1950-51       |               |               |                | 1951-52       |               |               |  |
|------------------------------|-----------------|---------|---------|----------------|---------------|---------------|---------------|----------------|---------------|---------------|---------------|--|
|                              | 1949-50         | 1950-51 | 1951-52 | July-<br>Sept. | Oct.-<br>Dec. | Jan.-<br>Mar. | Apr.-<br>June | July-<br>Sept. | Oct.-<br>Dec. | Jan.-<br>Mar. | Apr.-<br>June |  |
| Australia - total            | 745             | 639     | 565     | 101            | 199           | 172           | 167           | 68             | 161           | 184           | 152           |  |
| - total excl. J.O. transfers | 705             | 628     | 565     | 98             | 192           | 171           | 167           | 68             | 161           | 184           | 152           |  |
| New Zealand - total          | 298             | 191     | 331     | 32             | 37            | 63            | 59            | 47             | 85            | 97            | 102           |  |
| - total excl. J.O. transfers | 274             | 187     | 331     | 28             | 37            | 63            | 59            | 47             | 85            | 97            | 102           |  |
| Union of South Africa        | 96              | 109     | 116     | 18             | 41            | 33            | 17            | 10             | 39            | 39            | 28            |  |
| Argentina                    | 235             | 147     | 30      | 37             | 31            | 55            | 24            | 2              | 4             | 10            | 13            |  |
| Uruguay <u>b</u>             | 100             | 122     | 14      | 35             | 39            | 40            | 8             | 1              | 2             | 4             | 8             |  |
| Total                        | 1,474           | 1,208   | 1,056   | 223            | 347           | 363           | 275           | 128            | 291           | 334           | 303           |  |
| Total, excl. J.O. transfers  | 1,410           | 1,193   | 1,056   | 216            | 340           | 362           | 275           | 128            | 291           | 334           | 303           |  |

a Commencing 1st July.

b Series revised throughout to exclude wool tops.

Note: No wool was shipped from the Union of South Africa to the United Kingdom on behalf of the J.O. during the period under review.

Source: Commonwealth Economic Committee and U.K.-Dominion Wool Disposals, Ltd.

(b) Estimated clean weight - million lbs.

|                                  | Year  |       | 1950  |               | 1951          |                | 1952          |               | Jan.-June     |                |               |               |               |      |      |
|----------------------------------|-------|-------|-------|---------------|---------------|----------------|---------------|---------------|---------------|----------------|---------------|---------------|---------------|------|------|
|                                  | 1949  | 1950  | 1951  | Jan.-<br>Mar. | Apr.-<br>June | July-<br>Sept. | Oct.-<br>Dec. | Jan.-<br>Mar. | Apr.-<br>June | July-<br>Sept. | Oct.-<br>Dec. | Jan.-<br>Mar. | Apr.-<br>June | 1951 | 1952 |
| United States <sup>a</sup>       | 273   | 467   | 364   | 138           | 109           | 128            | 92            | 121           | 112           | 63             | 69            | 83            | 88            | 233  | 171  |
| United Kingdom                   | 418   | 365   | 273   | 101           | 126           | 73             | 65            | 104           | 66            | 53             | 50            | 85            | 115           | 169  | 200  |
| France <sup>b</sup>              | 213   | 174   | 148   | 50            | 46            | 44             | 32            | 41            | 49            | 40             | 18            | 53            | 48            | 90   | 102  |
| Japan <sup>c</sup>               | 23    | 45    | 72    | 12            | 17            | 5              | 12            | 17            | 23            | 16             | 17            | 22            | d             | 40   | d    |
| Italy <sup>b</sup>               | 95    | 85    | 72    | 19            | 20            | 25             | 21            | 18            | 22            | 13             | 19            | 25            | 24            | 40   | 49   |
| Germany (Fed. Rep.) <sup>b</sup> | 83    | 116   | 70    | 33            | 34            | 25             | 24            | 26            | 18            | 15             | 11            | 19            | 16            | 44   | 35   |
| Belgium <sup>b</sup>             | 70    | 80    | 41    | 20            | 28            | 12             | 19            | 15            | 11            | 10             | 6             | 11            | 12            | 26   | 23   |
| Canada <sup>a</sup>              | 25    | 27    | 23    | 7             | 7             | 7              | 6             | 6             | 6             | 9              | 3             | 3             | 6             | 12   | 9    |
| Netherlands <sup>b</sup>         | 31    | 29    | 15    | 7             | 11            | 6              | 6             | 5             | 3             | 2              | 4             | 4             | 4             | 8    | 8    |
| Total                            | 1,231 | 1,388 | 1,078 | 387           | 398           | 325            | 277           | 353           | 310           | 221            | 197           | 305           | 331           | 663  | 637  |

a Imports for consumption

Net imports

c Imports only; exports negligible

Not yet available; estimate included in total.

Source: Commonwealth Economic Committee.



TABLE VII - Prices for Dominions Wool

Pence per lb. - clean cost delivered United Kingdom

|                | :Sept.:            | :Oct.:             | :Nov.:             | :Dec.:             | :Jan.:             | :Feb.:             | :Mar.:            | :Apr.:             | :May :             | June :             | July               |
|----------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|-------------------|--------------------|--------------------|--------------------|--------------------|
| <u>1949-50</u> | :                  | :                  | :                  | :                  | :                  | :                  | :                 | :                  | :                  | :                  | :                  |
| 70's           | : 96               | :107               | :114               | :116               | :135               | :134               | :134              | :141               | :151               | : 146              | : 156              |
| 64's           | : 88               | :100               | :106               | :109               | :127               | :125               | :127              | :135               | :145               | : 140              | : 151              |
| 60's           | : 83               | : 95               | :101               | :101               | :117               | :111               | :118              | :123               | :135               | : 131              | : 141              |
| 58's           | : 68               | : 78               | : 84               | : 85               | : 98               | : 89               | : 90              | :103               | :111               | : 104              | : 111              |
| 56's           | : 58               | : 64 $\frac{1}{2}$ | : 70               | : 71               | : 84               | : 75               | : 75              | : 85               | : 91               | : 81               | : 90               |
| 50's           | : 38 $\frac{1}{2}$ | : 44 $\frac{1}{2}$ | : 57               | : 52 $\frac{1}{2}$ | : 61               | : 54 $\frac{1}{2}$ | : 57              | : 62 $\frac{1}{2}$ | : 67               | : 63               | : 72 $\frac{1}{2}$ |
| 48's           | : 37               | : 42 $\frac{1}{2}$ | : 54               | : 48               | : 58 $\frac{1}{2}$ | : 52               | : 55              | : 60 $\frac{1}{2}$ | : 65               | : 61 $\frac{1}{2}$ | : 71 $\frac{1}{2}$ |
| 46's           | : 36               | : 41               | : 51 $\frac{1}{2}$ | : 47               | : 57               | : 53               | : 55              | : 62               | : 65 $\frac{1}{2}$ | : 65               | : 72               |
| <u>1950-51</u> | :                  | :                  | :                  | :                  | :                  | :                  | :                 | :                  | :                  | :                  | :                  |
| 70's           | : 221              | :216               | :228               | :235               | :290               | :297               | :317              | :275               | :250               | : 177              | : 184              |
| 64's           | : 206              | :202               | :216               | :224               | :280               | :288               | :314              | :259               | :234               | : 169              | : 169              |
| 60's           | : 191              | :183               | :204               | :207               | :263               | :283               | :312              | :245               | :221               | : 163              | : 160              |
| 58's           | : 168              | :166               | :186               | :191               | :252               | :264               | :301              | :218               | :198               | : 150              | : 143              |
| 56's           | : 148              | :150               | :163               | :167               | :226               | :235               | :270              | :197               | :178               | : 135              | : 129              |
| 50's           | : 137              | :135               | :145               | :149               | :185               | :193               | :222              | :177               | :147               | : 108              | : 101              |
| 48's           | : 135              | :133               | :141               | :146               | :177               | :187               | :214 <sub>a</sub> | :173               | :142               | : 104 <sub>a</sub> | : 99               |
| 46's           | : 133              | :132               | :141               | :146               | :174               | :186               | :211 <sub>a</sub> | :168               | :138               | : 101 <sub>a</sub> | : 97               |
| <u>1951-52</u> | :                  | :                  | :                  | :                  | :                  | :                  | :                 | :                  | :                  | :                  | :                  |
| 70's           | : 122              | :166               | :145               | :144               | :135               | :126               | :116              | :119               | :134               | : 140              | : 145              |
| 64's           | : 112              | :152               | :135               | :136               | :126               | :120               | :110              | :112               | :127               | : 130              | : 137              |
| 60's           | : 102              | :136               | :119               | :119               | :111               | :103               | : 94              | : 92               | :109               | : 112              | : 124              |
| 58's           | : 94               | :124               | :110               | :104               | :102               | : 90               | : 82              | : 78               | : 92               | : 95               | : 102              |
| 56's           | : 87               | :112               | : 96               | : 89               | : 80               | : 77               | : 65              | : 63               | : 72               | : 73 <sub>a</sub>  | : 78               |
| 50's           | : 64               | : 85               | : 76               | : 74               | : 68               | : 65               | : 51              | : 52               | : 59               | : 61 <sub>a</sub>  | : 68               |
| 48's           | : 61               | : 82               | : 73               | : 72               | : 65               | : 65               | : 51              | : 51               | : 57               | : 58 <sub>a</sub>  | : 67               |
| 46's           | : 60               | : 82               | : 73               | : 70               | : 70               | : 66               | : 51              | : 50               | : 56               | : 57 <sub>a</sub>  | : 67               |
| <u>1952-53</u> | :                  | :                  | :                  | :                  | :                  | :                  | :                 | :                  | :                  | :                  | :                  |
| 70's           | : 138              | :143               | :                  | :                  | :                  | :                  | :                 | :                  | :                  | :                  | :                  |
| 64's           | : 126              | :131               | :                  | :                  | :                  | :                  | :                 | :                  | :                  | :                  | :                  |
| 60's           | : 110              | :114               | :                  | :                  | :                  | :                  | :                 | :                  | :                  | :                  | :                  |
| 58's           | : 97               | :101               | :                  | :                  | :                  | :                  | :                 | :                  | :                  | :                  | :                  |
| 56's           | : 79               | : 85 <sub>a</sub>  | :                  | :                  | :                  | :                  | :                 | :                  | :                  | :                  | :                  |
| 50's           | : 68               | : 74 <sub>a</sub>  | :                  | :                  | :                  | :                  | :                 | :                  | :                  | :                  | :                  |
| 48's           | : 67               | : 71 <sub>a</sub>  | :                  | :                  | :                  | :                  | :                 | :                  | :                  | :                  | :                  |
| 46's           | : 66               | : 69 <sub>a</sub>  | :                  | :                  | :                  | :                  | :                 | :                  | :                  | :                  | :                  |

a Quotations nominal

Note: August is omitted owing to the absence of sufficient sales in that month to ensure representative quotations.

Sources: U.K. - Dominion Wool Disposals Ltd. and New Zealand Wool Commission.







# FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE  
FOREIGN AGRICULTURAL SERVICE  
WASHINGTON, D. C.

FW 2-53

March 16, 1953

## MOVEMENT OF WOOL FROM SOUTHERN HEMISPHERE

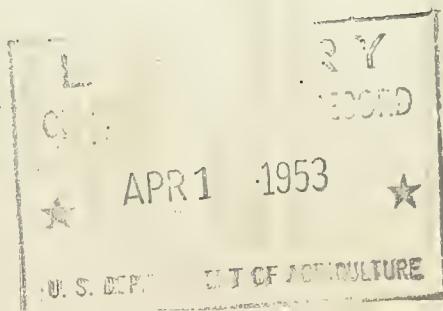
Exports of wool from the 5 major Southern Hemisphere producing countries, were up 52 percent in the first months of the current season over last season. Exports were up from all countries with the exception of New Zealand and all major consuming countries shared in the increase.

Exports from Argentina were up over 20 times from the very low level of last year and up about 9 times from Uruguay, as surpluses accumulated due to grower resistance to lower prices and governmental policy during last season, were moved into consumption.

Exports from Australia reflects increased production and better clearance at auctions as consuming countries purchased early and steadily to rebuild low mill stocks and keep pipelines filled. This has been particularly true of the United Kingdom and Japan. Movement out of New Zealand has been normal but not up to the level of last year when special sales were held in August to move wool held over from the previous season by labor troubles. Exports from South Africa, up 20 percent over last year, reflects the increased demand for wool this year in the United Kingdom and Western Europe.

All consuming countries have shared in the increased exports; however, movement to the United States was up only 2 percent in contrast to a 164 percent increase to the United Kingdom. Japan has been an important factor in the market this year, taking substantial quantities from Australia. Western Europe and especially the United Kingdom have been active in South America markets in the past few months after having been a minor factor in both Argentina and Uruguay for the past several years.

The period under study (July-December) has seen an extraordinarily stable market which has given confidence and allowed mills and dealers to begin to rebuild stocks without fear of substantial losses. World consumption increased by about 12 percent in the final quarter of 1952 over the previous quarter and reached the highest level of the past 2 years.







Supplies appear adequate, at somewhere near present price levels, for the increased rate of consumption until the 1953-54 Southern Hemisphere production becomes available. Judging from the rate of movement in the first part of the current season most of the old clip held in Argentina and Uruguay will be in the consuming countries at the end of the season as well as good clearance of current production from all major producing countries.

#### United States Imports of Wool

United States imports of dutiable apparel wools are presented on a calendar year basis and are not comparable to export data shown in the preceding tables. Compared with 1951, imports of total dutiable apparel wool in 1952 decreased 12 percent; however, imports of carpet types increased by about 48 percent, (not shown on table) for a total decrease of 2 percent or from 555 million pounds to 544 million pounds in 1952.

As the movement data for the last half of 1952 indicated, United States imports of apparel wool for the year increased 117 percent from New Zealand, 4 percent from the Union of South Africa, and 14 percent from Argentina, while decreases of 46 percent and 26 percent respectively were shown for imports from Uruguay and Australia.

#### United States Imports of Tops

United States imports of tops of hair, which are practically all sheep's wool, in the final quarter of 1952 totaled 7,565 thousand pounds compared with 2,218 thousand pounds in the same quarter of 1951. At the same time imports from Uruguay, the chief source of United States top imports, were about five times as large as in the final quarter of 1951. Imports during October were exceptionally heavy because of withdrawals from bond because of the possibility of increased duty as a result of the tariff investigation concluded in late September. Other suppliers of tops are the United Kingdom, Australia, Italy and some of the Western European countries.

Season begins July 1 in Australia, New Zealand, and the Union of South Africa, and October 1 in Argentina and Uruguay.

For information on wool production by countries, see FW 5-52, Foreign Agriculture Circular, "World Wool Production in 1952," November 24, 1952.

TOPS OF HAIR <sup>1/</sup>: United States Imports from Argentina  
and Uruguay and total all countries  
by months.

| Period         | Argentina | Uruguay  | Others   | Total all countries |
|----------------|-----------|----------|----------|---------------------|
|                | Quantity  | Quantity | Quantity | Quantity            |
|                | 1,000     | 1,000    | 1,000    | 1,000               |
|                | pounds    | pounds   | pounds   | pounds              |
| 1951-52 Season |           |          |          |                     |
| October        | 147       | 638      | 532      | 1,317               |
| November       | 63        | 212      | 201      | 476                 |
| December       | 142       | 179      | 104      | 425                 |
| Sub-Total      | 352       | 1,029    | 837      | 2,218               |
| January        | 111       | 731      | 88       | 930                 |
| February       | 366       | 927      | 399      | 1,692               |
| March          | 274       | 847      | 101      | 1,222               |
| April          | 169       | 879      | 319      | 1,367               |
| May            | 39        | 2,016    | 233      | 2,288               |
| June           | 33        | 1,528    | 403      | 1,964               |
| July           | 25        | 1,647    | 413      | 2,085               |
| August         | 25        | 1,800    | 636      | 2,461               |
| September      | 27        | 1,200    | 322      | 1,549               |
| Total          | 1,421     | 12,604   | 3,751    | 17,776              |
| 1952-53 Season |           |          |          |                     |
| October        | 232       | 4,513    | 1,058    | 5,803               |
| November       | 0         | 449      | 636      | 1,085               |
| December       | 9         | 602      | 66       | 677                 |
| Sub-Total      | 241       | 5,564    | 1,760    | 7,565               |

<sup>1/</sup> Includes tops of camel hair, mohair, wool, alpaca and vicuna.  
(Practically all sheep's wool.)



DUTYTABLE APPAREL WOOL: United States imports for consumption by principal countries, 1939-52 1/  
 wool not finer than 40's, 40's-44's, 44's-56's and over 56's  
 (Actual weight)

| Country                                   | 1939            | 1940    | 1941    | 1942    | 1943    | 1944    | 1945         | 1946    | 1947    | 1948    | 1949    | 1950    | 1951    | 1952    |
|---|-----------------|---------|---------|---------|---------|---------|--------------|---------|---------|---------|---------|---------|---------|---------|
|   | 1,000           | 1,000   | 1,000   | 1,000   | 1,000   | 1,000   | 1,000        | 1,000   | 1,000   | 1,000   | 1,000   | 1,000   | 1,000   | 1,000   |
|   | pounds          | pounds  | pounds  | pounds  | pounds  | pounds  | pounds       | pounds  | pounds  | pounds  | pounds  | pounds  | pounds  | pounds  |
| Australia                                 | 253             | 114     | 105     | 45      | 58      | 4       | 88           | 232     | 84      | 246     | 847     | 1,557   | 370     | 377     |
| New Zealand                               | 3,278           | 348     | 260     | 576     | 331     | 576     | 1,456        | 1,815   | 742     | 325     | 315     | 1,460   | 1,150   | 4,598   |
| Union of South Africa                     | 0               | 19      | 154     | 17      | 4       | 0       | 14           | 0       | 1       | 54      | 191     | 818     | 679     | 823     |
| Uruguay                                   | 550             | 1,142   | 2,249   | 1,206   | 327     | 735     | 737          | 667     | 481     | 549     | 307     | 567     | 374     | 381     |
| Argentina                                 | 11,163          | 15,133  | 31,186  | 29,371  | 12,720  | 36,947  | 34,660       | 65,026  | 35,707  | 22,827  | 11,408  | 15,200  | 21,462  | 20,346  |
| Other countries                           | 2,123           | 1,096   | 1,388   | 820     | 514     | 508     | 1,389        | 709     | 321     | 575     | 295     | 795     | 727     | 828     |
| Total                                     | 17,367          | 17,852  | 35,342  | 32,035  | 13,954  | 38,770  | 38,344       | 68,449  | 37,336  | 24,576  | 13,363  | 20,397  | 24,762  | 27,353  |
| Australia                                 | 31              | 30      | 23      | 100     | 27      | 36      | 40's to 44's | 191     | 224     | 99      | 707     | 1,546   | 587     | 1,188   |
| New Zealand                               | 2,896           | 1,311   | 970     | 2,690   | 3,436   | 5,022   | 8,180        | 11,025  | 8,309   | 4,247   | 3,551   | 9,340   | 6,245   | 20,068  |
| Union of South Africa                     | 0               | 0       | 40      | 4       | 0       | 0       | 0            | 0       | 0       | 0       | 1       | 7       | 0       | 40      |
| Uruguay                                   | 2,382           | 2,105   | 6,078   | 2,389   | 2,658   | 2,975   | 3,009        | 3,774   | 2,029   | 2,706   | 1,531   | 2,007   | 990     | 703     |
| Argentina                                 | 917             | 2,260   | 5,313   | 9,160   | 23,815  | 21,681  | 11,914       | 17,500  | 8,832   | 7,260   | 3,332   | 2,479   | 492     | 542     |
| Other countries                           | 810             | 631     | 645     | 605     | 407     | 421     | 613          | 511     | 288     | 311     | 364     | 850     | 639     | 843     |
| Total                                     | 7,036           | 6,338   | 13,069  | 14,948  | 30,343  | 30,135  | 23,884       | 33,001  | 19,682  | 14,623  | 9,486   | 16,229  | 8,953   | 23,384  |
| Australia                                 | 2,578           | 3,213   | 2,524   | 6,149   | 6,136   | 3,551   | 9,672        | 12,963  | 9,291   | 4,301   | 4,279   | 10,074  | 8,641   | 12,926  |
| New Zealand                               | 3,624           | 2,557   | 3,382   | 14,237  | 15,306  | 12,168  | 32,298       | 35,056  | 15,786  | 11,137  | 7,394   | 13,922  | 20,055  | 37,237  |
| Union of South Africa                     | 25              | 224     | 1,892   | 1,856   | 878     | 97      | 491          | 726     | 195     | 54      | 60      | 51      | 179     | 490     |
| Uruguay                                   | 6,335           | 17,836  | 36,188  | 11,848  | 39,378  | 44,555  | 60,040       | 29,349  | 9,452   | 14,366  | 4,661   | 11,041  | 12,056  | 3,450   |
| Argentina                                 | 2,524           | 12,526  | 46,220  | 42,620  | 48,710  | 30,992  | 38,958       | 40,148  | 14,167  | 18,875  | 7,329   | 10,219  | 5,229   | 5,330   |
| Other countries                           | 4,213           | 7,849   | 9,687   | 8,179   | 17,622  | 41,077  | 19,351       | 12,247  | 5,530   | 6,488   | 4,271   | 6,552   | 7,887   | 6,549   |
| Total                                     | 19,299          | 44,206  | 99,893  | 84,889  | 128,030 | 132,440 | 160,810      | 130,489 | 54,421  | 55,221  | 27,994  | 51,859  | 54,047  | 65,982  |
| Australia                                 | 26,500          | 36,115  | 235,000 | 496,349 | 290,918 | 206,692 | 277,945      | 336,235 | 204,060 | 138,701 | 93,046  | 124,479 | 180,199 | 126,282 |
| New Zealand                               | 180             | 106     | 683     | 7,354   | 4,375   | 2,667   | 7,525        | 6,355   | 5,599   | 2,841   | 2,068   | 3,369   | 6,936   | 12,639  |
| Union of South Africa                     | 8,303           | 31,008  | 41,579  | 75,345  | 42,557  | 23,839  | 37,979       | 116,339 | 42,035  | 31,960  | 27,293  | 20,765  | 40,584  | 41,577  |
| Uruguay                                   | 7,345           | 23,203  | 59,171  | 13,945  | 57,618  | 54,060  | 79,235       | 58,334  | 50,488  | 84,555  | 60,912  | 105,644 | 79,737  | 45,316  |
| Argentina                                 | 4,638           | 50,687  | 100,515 | 46,185  | 57,729  | 37,242  | 29,184       | 39,634  | 17,760  | 48,465  | 15,647  | 43,977  | 14,646  | 21,488  |
| Other countries                           | 1,211           | 7,487   | 12,100  | 5,720   | 13,107  | 13,760  | 14,893       | 11,953  | 5,384   | 14,239  | 11,528  | 12,198  | 16,360  | 10,452  |
| Total                                     | 48,277          | 148,605 | 449,048 | 644,898 | 466,304 | 338,260 | 446,761      | 572,850 | 325,326 | 320,761 | 210,494 | 310,432 | 338,462 | 257,754 |
| Total dutiable                            | 91,979          | 217,001 | 597,352 | 776,770 | 638,631 | 539,605 | 669,799      | 804,789 | 436,766 | 415,181 | 261,337 | 398,917 | 426,224 | 374,473 |
| 1/ Excludes courtesy and carbonized wool. | 2/ Preliminary. |         |         |         |         |         |              |         |         |         |         |         |         |         |

Source: Bureau of Census, Department of Commerce.

Compiled in Livestock and Wool Division, FAS, March 1953.

WOOL: Exports from principal Southern Hemisphere countries, wool year basis, average 1934-38, annual 1949-51

(Actual weight)

| Country of destination              | Australia       |                 | New Zealand     |                 | Union of South Africa |                 | Argentina       |                 | Uruguay         |                 |     |     |     |     |     |     |     |     |
|-------------------------------------|-----------------|-----------------|-----------------|-----------------|-----------------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----|-----|-----|-----|-----|-----|-----|-----|
|                                     | 1934-38         | 1950            | 1934-38         | 1950            | 1934-38               | 1950            | 1934-38         | 1950            | 1934-38         | 1950            |     |     |     |     |     |     |     |     |
|                                     | Million: pounds | Million: pounds | Million: pounds | Million: pounds | Million: pounds       | Million: pounds | Million: pounds | Million: pounds | Million: pounds | Million: pounds |     |     |     |     |     |     |     |     |
| United States                       | 26              | 130             | 170             | 153             | 15                    | 51              | 40              | 91              | 33              | 63              | 87  | 237 | 53  | 15  | 121 | 120 | 61  |     |
| United Kingdom                      | 321             | 448             | 318             | 258             | 164                   | 210             | 124             | 203             | 44              | 58              | 55  | 85  | 2   | 8   | 7   | 20  | 2   | 16  |
| Canada                              | 3               | 16              | 12              | 6               | 10                    | 11              | 9               | 13              | -               | 1               | 1   | -   | -   | -   | 0   | 0   | 0   | -   |
| Continental Europe                  |                 |                 |                 |                 |                       |                 |                 |                 |                 |                 |     |     |     |     |     |     |     |     |
| France                              | 110             | 155             | 139             | 142             | 25                    | 38              | 28              | 64              | 50              | 23              | 31  | 48  | 53  | 20  | 8   | 7   | 11  | 4   |
| Belgium                             | 116             | 131             | 98              | 64              | 13                    | 12              | 9               | 18              | 21              | 21              | 20  | 20  | 10  | 5   | 4   | 10  | 12  | 3   |
| Germany                             | 37              | 59              | 40              | 29              | 7                     | 31              | 14              | 20              | 64              | 24              | 22  | 49  | 8   | 9   | 3   | 31  | 8   | 5   |
| Italy                               | 22              | 73              | 70              | 91              | 1                     | 8               | 5               | 17              | 16              | 9               | 18  | 19  | 20  | 12  | 2   | 13  | 7   | 5   |
| Netherlands                         | 13              | 15              | 8               | 4               | -                     | 15              | 4               | 8               | 1               | 5               | 2   | 2   | 5   | 4   | 4   | 4   | 5   | 5   |
| Sweden                              | 4               | 9               | 13              | 7               | 0                     | 1               | 0               | 2               | 1               | 1               | 1   | 1   | 4   | 2   | 1   | 2   | 5   | 2   |
| Poland                              | 13              | 37              | 23              | 11              | -                     | 4               | 10              | 13              | 3               | 1               | 1   | 10  | 1   | 4   | -   | 2   | 0   | 0   |
| Others                              | 26              | 17              | 7               | 4               | 1                     | 2               | 1               | 7               | 1               | 2               | 0   | 6   | 19  | 11  | 3   | 3   | 3   | 1   |
| Total Continental Europe            | 341             | 496             | 398             | 352             | 47                    | 111             | 71              | 151             | 157             | 88              | 95  | 111 | 120 | 67  | 25  | 72  | 51  | 25  |
| Japan                               | 132             | 56              | 77              | 91              | 18                    | 4               | 5               | 6               | 21              | 3               | 1   | 10  | 7   | 1   | 2   | 8   | 5   | 1   |
| Other Near and Far East             | 2               | -               | 0               | 2               | 2                     | -               | 0               | 1               | 0               | 0               | 0   | 0   | -   | 0   | 0   | -   | -   | 0   |
| Australia                           | 0               | 0               | 0               | 0               | 11                    | 6               | 3               | 3               | 0               | 0               | 0   | -   | 0   | 0   | 0   | 0   | -   | 0   |
| Union of Soviet Socialist Republics | 0               | 37              | 14              | 0               | 0                     | 10              | 3               | 0               | 0               | 0               | 0   | 0   | 0   | 0   | 0   | 0   | 0   | 0   |
| All others                          | 2               | 28              | 0               | 39              | 9                     | 8               | 7               | 5               | 7               | 5               | 6   | 7   | 6   | 6   | 3   | 0   | 2   | 1   |
| Total                               | 827             | 1,211           | 1,025           | 907             | 274                   | 411             | 262             | 475             | 231             | 179             | 197 | 214 | 306 | 366 | 180 | 100 | 115 | 104 |

Season beginning July 1 in Australia, New Zealand, and Union of South Africa, and October 1 in Argentina and Uruguay. Dash (-) indicates negligible amount included with "Others."  
Compiled from official sources and reports of Foreign Service Officers.





# FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE  
FOREIGN AGRICULTURAL SERVICE  
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## WORLD WOOL PRODUCTION IN 1953

World wool production in 1953 is estimated at 4,330 million pounds, grease basis, an increase of 40 million pounds over the substantially revised 1952 production, according to the semi-annual wool report of the Foreign Agricultural Service.

The previous record clip was set in 1942 when because of wartime demands 4,200 million pounds were produced. Output declined steadily after that year as wool production became relatively less profitable and reached a low of 3,710 million pounds in 1947 after severe drought in Australia. These estimates include both apparel and carpet types and the clean yield of the 1953 forecasted production should approach 2,500 million pounds.

WOOL: Estimated world production, greasy basis, by continents, averages 1936-40, 1946-50, annual 1949-53

| Continent     | Average  |          | 1949     | 1950     | 1951     | 1952     | 1953     |
|---------------|----------|----------|----------|----------|----------|----------|----------|
|               | 1935-39: | 1946-50: |          |          |          |          |          |
|               | Million: | Million: | Million: | Million: | Million: | Million: | Million: |
|               | pounds   | pounds   | pounds   | pounds   | pounds   | pounds   | pounds   |
| North         |          |          |          |          |          |          |          |
| America.....  | 452      | 309      | 270      | 271      | 272      | 288      | 281      |
| Europe.....   | 483      | 426      | 448      | 465      | 476      | 285      | 488      |
| U.S.S.R. .... | 310      | 311      | -        | -        | -        | -        | -        |
| Asia.....     | 344      | 356      | 346      | 362      | 375      | 394      | 395      |
| South         |          |          |          |          |          |          |          |
| America.....  | 639      | 735      | 708      | 739      | 737      | 743      | 759      |
| Africa.....   | 336      | 282      | 283      | 305      | 324      | 330      | 337      |
| Oceania.....  | 1,366    | 1,422    | 1,500    | 1,482    | 1,459    | 1,654    | 1,668    |
| Total 1/..... | 3,930    | 3,840    | 3,890    | 3,970    | 4,020    | 4,290    | 4,330    |

1/ Rounded to tens of million pounds. Foreign Agricultural Service, June 1953.

Based upon estimates of the spring clip in the Northern Hemisphere combined with that produced in the season beginning July 1 or October 1 of the same year in the Southern Hemisphere. Pulled wool is included for most countries at its greasy equivalent. Late each spring an estimate is made of the Northern Hemisphere clip, plus a forecast for the Southern Hemisphere. Data, especially for the Southern Hemisphere, are reviewed at this time each fall.

A summary of this information was published in the June 15, 1953 issue of Foreign Crops and Markets.



Weather and feed conditions in the major wool producing countries as well as most of the smaller countries have been relatively favorable over the past 12 to 15 months. Prices on world markets for wool and meat have also been favorable since early 1952. Sheep numbers are estimated to be up about 1 percent over 1952 but increased yield per fleeces, particularly in Australia, accounts for the major part of the increase.

Notwithstanding the upward revision in the estimate of wool production for 1952 (revised to 4,290 million pounds from 4,170 estimated last November) and the availability of carry-over wool in South America, the 1952 clip sold well and at prices generally appreciating throughout the year. Additions during the selling season to the stockpile in the United Kingdom and the movement of wool to the Commodity Credit Corporation in the United States were factors lending strength to the market.

Production in the United States is estimated at 260 million pounds, a decrease of 6 million pounds from 1952 outturn which was up only slightly over the low level of 1949 through 1951. Sheep numbers were down about 1 percent on January 1, 1953. Canadian output made a small recovery in 1953 reversing the long downward trend in sheep numbers and wool production in that country.

Wool production in Western Europe made another small increase, continuing the postwar trend. Total output at 396 million pounds in 1953 is about 5 percent above the prewar average. Some gains over 1952 were made in the United Kingdom, Spain and Greece.

On the basis of indicated sheep numbers in the U.S.S.R. a larger wool production figure has been included in the total and the series revised. This revision accounts for about 30 million pounds for each year 1949 through 1953.

Total output of coarse wools in the Near East, India and Pakistan is estimated to have remained at about the same level reflecting the somewhat uncertain market for carpet type wools over the past 2 years. A similar situation appears to exist in North Africa.

In the major wool exporting countries of Australia, New Zealand, Union of South Africa, Argentina and Uruguay substantial gains were made in 1952 and further increases are indicated for 1953.

Average fleece weight during the season ending June 30 in Australia was apparently about 4 percent higher than in any other recent year and about 12 percent higher than in 1951-52 largely as a result of better feed conditions. Early shearings and condition of flocks indicate that this tendency will likely continue to some extent into the coming season for which shearing will commence in volume in the next 60 days. Sheep numbers are also up about 2 percent over a year ago. Slaughter is up indicating larger output of wool on skins.



Production in New Zealand continued its steady increase into 1952 and another increase to 418 million pounds, a new record is forecast for 1953-54, based on increased sheep numbers. There has also been a steady increase in wool output in the Union of South Africa and the further gain should materialize in 1953, weather and feed conditions permitting.

In Uruguay the improved marketing situation of the past year and the current outlook has encouraged a small increase in sheep numbers over a year ago which appears to warrant a larger forecast for 1953 wool output. Although the shift to cattle in Argentina has brought about a slight decrease in sheep numbers the good condition of flocks and adequate feed supplies together with the more promising market outlook accounts for the expected increase.

The increased output as noted above plus some carry-over in Argentina and government stocks in the United States and the United Kingdom provides adequate supplies for a high level of wool consumption which would seem to preclude any large price increase over the next 15 months. On the other hand expected consumption as judged from the rate in the first quarter of 1953 should lend strength to world wool prices.

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This is one of a series of regularly scheduled reports on world agricultural production approved by the Foreign Agricultural Service Committee on Foreign Crop and Livestock Statistics. It is based in part upon U. S. Foreign Service reports.

WOOL: Production in specified countries, greasy basis,  
averages 1936-40 and 1946-50; annual 1949 to 1953 1/

| Continent and country              | Averages       |                |                |                |                | 1951           | 1952 2/        | 1953 2/        |
|------------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
|                                    | 1936-40        | 1946-50        | 1949           | 1950           | 1951           |                |                |                |
|                                    | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds |
| <b>NORTH AMERICA</b>               |                |                |                |                |                |                |                |                |
| Canada.....                        | 15.6           | 12.4           | 9.8            | 9.5            | 6.9            | 7.7            | 8.0            |                |
| Mexico.....                        | 10.3           | 11.4           | 11.5           | 13.2           | 13.7           | 13.2           | 12.8           |                |
| United States                      |                |                |                |                |                |                |                |                |
| Shorn.....                         | 360.6          | 238.5          | 212.9          | 215.4          | 225.5          | 232.4          |                |                |
| Pulled.....                        | 64.7           | 46.5           | 35.6           | 32.4           | 25.9           | 33.6           |                |                |
| Total.....                         | 425.3          | 285.0          | 248.5          | 247.8          | 251.4          | 266.0          | 260.0          |                |
| Estimated total 3/.....            | 451.7          | 309.4          | 270.5          | 271.2          | 272.5          | 287.5          | 281.4          |                |
| <b>EUROPE</b>                      |                |                |                |                |                |                |                |                |
| Austria.....                       | 2.1            | -              | -              | -              | -              | -              | -              |                |
| Finland.....                       | 2.7            | 3.2            | 3.7            | 4.0            | 4.4            | 4.5            | 4.5            |                |
| France.....                        | 37.1           | 30.6           | 33.9           | 35.0           | 40.0           | 41.9           | 41.9           |                |
| Germany, Western.....              | 21.7           | 17.3           | 19.2           | 15.3           | 14.4           | 13.7           | 13.0           |                |
| Greece.....                        | 19.3           | 17.4           | 17.1           | 16.5           | 17.0           | 19.2           | 21.2           |                |
| Ireland.....                       | 17.2           | 13.1           | 12.0           | 13.7           | 14.0           | 14.8           | 14.8           |                |
| Italy.....                         | 30.4           | 30.2           | 35.3           | 35.0           | 35.5           | 35.0           | 34.0           |                |
| Netherlands.....                   | 6.1            | 5.4            | 6.2            | 6.5            | 6.5            | 6.5            | 6.5            |                |
| Norway.....                        | 5.9            | 6.4            | 6.8            | 7.3            | 7.7            | 7.8            | 7.9            |                |
| Portugal.....                      | 16.3           | 18.4           | 17.0           | 21.2           | 22.0           | 22.0           | 22.5           |                |
| Spain.....                         | 70.0           | 83.2           | 82.0           | 90.0           | 90.0           | 93.0           | 94.0           |                |
| United Kingdom.....                | 110.1          | 81.2           | 88.0           | 89.0           | 92.7           | 95.1           | 97.0           |                |
| Yugoslavia.....                    | 34.7           | 30.0           | 33.6           | 34.3           | 32.0           | 32.0           | 32.0           |                |
| Total Western Europe.....          | 378.8          | 343.6          | 362.0          | 374.9          | 383.4          | 392.6          | 396.2          |                |
| Other Europe 4/.....               | 104.5          | 82.2           | 86.3           | 89.9           | 92.2           | 92.3           | 92.3           |                |
| Estimated total                    |                |                |                |                |                |                |                |                |
| (excl. U.S.S.R.) 5/.....           | 483.3          | 425.8          | 448.3          | 464.8          | 475.6          | 484.9          | 488.5          |                |
| U.S.S.R. (Europe and Asia) 5/..... | 310.2          | 311.5          | -              | -              | -              | -              | -              |                |



# ASIA

|                         |       |       |       |       |       |       |       |
|-------------------------|-------|-------|-------|-------|-------|-------|-------|
| Iran.....               | 36.3  | 29.3  | 24.7  | 32.6  | 34.2  | 36.6  | 37.5  |
| Iraq.....               | 21.6  | 27.3  | 26.7  | 28.7  | 30.0  | 32.0  | 32.0  |
| Lebanon.....            | -     | -     | -     | -     | 2.4   | 2.5   | 2.5   |
| Syria.....              | 10.7  | 12.2  | 10.0  | 13.0  | 15.0  | 16.0  | 13.0  |
| Turkey.....             | 67.7  | 70.7  | 70.9  | 67.2  | 72.9  | 77.9  | 80.0  |
| Afghanistan.....        | 15.0  | 16.4  | -     | -     | -     | -     | -     |
| China 7/.....           | 88.0  | 75.0  | -     | -     | -     | -     | -     |
| India.....              | 72.9  | 51.8  | 46.2  | 50.5  | 52.0  | 58.0  | 56.5  |
| Japan.....              | -     | -     | 2.2   | 2.6   | 3.2   | 4.5   | 5.0   |
| Pakistan.....           | -     | 26.4  | 27.0  | 27.8  | 27.2  | 28.0  | 30.0  |
| Estimated total 9/..... | 344.2 | 355.6 | 346.4 | 362.3 | 374.8 | 393.5 | 394.5 |

# SOUTH AMERICA

|                          |       |       |       |       |       |       |       |
|--------------------------|-------|-------|-------|-------|-------|-------|-------|
| Argentina.....           | 411.0 | 449.8 | 415.0 | 430.0 | 420.0 | 420.0 | 430.0 |
| Brazil.....              | 35.5  | 45.8  | 48.5  | 47.4  | 51.8  | 51.8  | 52.0  |
| Chile.....               | 32.6  | 42.3  | 46.3  | 41.9  | 41.9  | 44.1  | 45.0  |
| Falkland Islands.....    | 4.0   | 4.2   | 4.3   | 4.4   | 4.2   | 5.0   | 5.0   |
| Peru.....                | 19.4  | 17.7  | 18.7  | 19.2  | 20.5  | 20.5  | 20.5  |
| Uruguay.....             | 126.2 | 162.9 | 163.3 | 185.0 | 187.4 | 190.0 | 195.0 |
| Estimated total 10/..... | 638.9 | 735.4 | 707.7 | 739.5 | 737.4 | 743.3 | 759.4 |

# AFRICA

|                                |       |       |       |       |       |       |       |
|--------------------------------|-------|-------|-------|-------|-------|-------|-------|
| Algeria.....                   | 22.6  | 16.2  | 15.6  | 19.6  | 22.8  | 28.0  | 29.0  |
| Egypt.....                     | 7.5   | 6.7   | 6.4   | 8.0   | 6.6   | 7.0   | 8.0   |
| French Morocco.....            | 35.1  | 27.2  | 30.0  | 33.1  | 35.3  | 30.0  | 30.0  |
| Tunisia.....                   | 12.0  | 9.9   | 8.0   | 11.0  | 12.0  | 13.0  | 13.0  |
| Union of South Africa 11/..... | 252.3 | 215.9 | 217.5 | 227.5 | 240.0 | 245.0 | 250.0 |
| Estimated total 12/.....       | 336.8 | 281.9 | 283.0 | 304.6 | 323.5 | 329.8 | 336.8 |

# OCEANIA

|                                |         |         |         |         |         |         |         |
|--------------------------------|---------|---------|---------|---------|---------|---------|---------|
| Australia.....                 | 1,051.9 | 1,050.0 | 1,110.0 | 1,092.0 | 1,052.4 | 1,240.0 | 1,250.0 |
| New Zealand.....               | 313.8   | 371.6   | 390.0   | 390.0   | 406.7   | 413.4   | 418.0   |
| Total.....                     | 1,365.9 | 1,421.7 | 1,500.1 | 1,482.1 | 1,459.2 | 1,653.5 | 1,668.1 |
| Estimated world total 13/..... | 3,930.0 | 3,840.0 | 3,890.0 | 3,970.0 | 4,020.0 | 4,290.0 | 4,330.0 |

1/ For summary purposes wool produced mostly in the spring in the Northern Hemisphere is combined with that produced in the season beginning July 1 or October 1 of the same year in the Southern Hemisphere. Pulled wool is included for most countries at its greasy equivalent. 2/ Preliminary. 3/ Includes estimates for Newfoundland, Netherland West Indies, Guatemala and El Salvador. 4/ Includes the Iron Curtain Countries, (Albania, Bulgaria, Czechoslovakia, Hungary, Poland, Rumania and Eastern Germany). 5/ Based on present boundaries. 6/ Includes estimates for countries producing 2 million pounds or less, namely Belgium, Denmark, Iceland, Sweden and Switzerland. 7/ Includes China Proper (22 provinces) Manchuria, Jehol and Sinkiang (Turkestan). 8/ Includes Pakistan. 9/ Includes estimates for Afghanistan, Cyprus, Palestine, Transjordan, Outer Mongolia, Tibet, Nepal and China. 10/ Includes relatively small production in Bolivia, Colombia, Ecuador, Paraguay, and Venezuela. 11/ Union of South Africa, Union Protectorate and South West Africa. 12/ Includes estimates for Kenya, French West Africa and Togo. 13/ Rounded to tens of millions.

Foreign Agricultural Service. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officers, results of office research and other information. Estimates for countries having changed boundaries have been adjusted to present boundaries except as noted. June, 1953.

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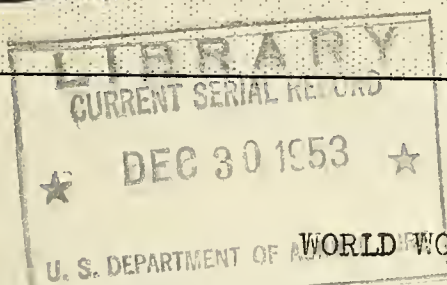




# FOREIGN AGRICULTURE CIRCULAR

UNITED STATES DEPARTMENT OF AGRICULTURE  
FOREIGN AGRICULTURAL SERVICE  
WASHINGTON, D. C.

FW-4-53



December 9, 1953

## WORLD WOOL PRODUCTION IN 1953

World wool production in 1953 is at an all time high of 4,410 million pounds, greasy basis, according to information available to the Foreign Agricultural Service. This is an increase of 80 million pounds over last year's record output and 210 million pounds or 5 percent over the previous high of 4,200 million pounds in 1942.

World wool output has increased each year since the postwar low of 3,700 million pounds in 1947 reflecting general recovery from drought in the more specialized wool producing areas and the more favorable competitive position of wool relative to other farm enterprises in major wool-producing countries of the Southern Hemisphere.

Practically all countries of the world are now at or exceeding prewar levels of wool production. The chief exceptions are the United States, Canada, Western Germany and the United Kingdom where economic conditions do not appear to be as favorable for the production of wool.

WOOL: Estimated world production, greasy basis, by continents, averages 1936-40, 1946-50, annual 1949-53

| Continent     | Averages       |                | 1949           | 1950           | 1951           | 1952           | 1953           |
|---------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
|               | 1936-40        | 1946-50        |                |                |                |                |                |
|               | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds |
| N. America... | 452            | 309            | 270            | 271            | 272            | 288            | 286            |
| Europe.....   | 483            | 426            | 448            | 465            | 479            | 494            | 503            |
| U.S.S.R.....  | 310            | 312            | "              | 350            | 380            | 400            | 400            |
| Asia.....     | 344            | 356            | 346            | 362            | 375            | 393            | 402            |
| S. America... | 639            | 735            | 708            | 740            | 737            | 725            | 747            |
| Africa.....   | 337            | 282            | 283            | 305            | 323            | 346            | 354            |
| Oceania.....  | 1,366          | 1,422          | 1,500          | 1,508          | 1,487          | 1,698          | 1,731          |
| Total 1/...   | 3,930          | 3,840          | 3,890          | 4,000          | 4,050          | 4,330          | 4,410          |

1/ Rounded to tens of million pounds. Foreign Agricultural Service, November 1953

This summary is based upon estimates of the spring clip in the Northern Hemisphere combined with that produced in the season beginning July 1 or October 1 of the same year in the Southern Hemisphere. Pulled wool is included for most countries at its greasy equivalent. Late each spring an estimate is made of the Northern Hemisphere clip, plus a forecast for the Southern Hemisphere. Data especially for the Southern Hemisphere, are reviewed at this time each fall.

WOOL: Production in specified countries, greasy basis,  
averages 1936-40 and 1946-50; annual 1949 to 1953 1/

| Continent and country              | Averages       |                |                |                |                | 1951           | 1952 2/        | 1953 2/        |
|------------------------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
|                                    | 1936-40        | 1946-50        | 1949           | 1950           | 1951           |                |                |                |
|                                    | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds |
| <b>NORTH AMERICA</b>               |                |                |                |                |                |                |                |                |
| Canada.....                        | 15.6           | 12.4           | 9.8            | 9.5            | 6.9            | 7.7            | 8.0            |                |
| Mexico.....                        | 10.3           | 11.4           | 11.5           | 13.2           | 13.7           | 13.2           | 12.8           |                |
| United States                      |                |                |                |                |                |                |                |                |
| Shorn.....                         | 360.6          | 238.5          | 212.9          | 215.4          | 225.5          | 232.4          | 229.3          |                |
| Pulled.....                        | 64.7           | 46.5           | 35.6           | 32.4           | 25.9           | 33.6           |                |                |
| Total.....                         | 425.3          | 285.0          | 248.5          | 247.8          | 251.4          | 266.0          | 265.0          |                |
| Estimated total 3/.....            | 451.7          | 309.4          | 270.5          | 271.2          | 272.5          | 287.5          | 286.4          |                |
| <b>EUROPE</b>                      |                |                |                |                |                |                |                |                |
| Austria.....                       | 2.1            | -              | -              | -              | -              | -              | -              | 4.5            |
| Finland.....                       | 2.7            | 3.2            | 3.7            | 4.0            | 4.4            | 4.5            | 4.5            |                |
| France.....                        | 37.1           | 30.6           | 33.9           | 35.0           | 40.0           | 41.9           | 41.9           |                |
| Germany, Western.....              | 21.7           | 17.3           | 19.2           | 15.3           | 14.4           | 13.7           | 13.0           |                |
| Greece.....                        | 19.3           | 17.4           | 17.1           | 16.5           | 17.0           | 19.2           | 21.2           |                |
| Ireland.....                       | 17.2           | 13.1           | 12.0           | 13.7           | 14.0           | 15.4           | 16.5           |                |
| Italy.....                         | 30.4           | 30.2           | 35.3           | 35.0           | 35.5           | 35.0           | 33.7           |                |
| Netherlands.....                   | 6.1            | 5.4            | 6.2            | 6.5            | 6.5            | 6.5            | 6.5            |                |
| Norway.....                        | 5.9            | 6.4            | 6.8            | 7.3            | 7.7            | 7.8            | 7.9            |                |
| Portugal.....                      | 16.3           | 18.4           | 17.0           | 21.2           | 22.0           | 22.0           | 22.5           |                |
| Spain.....                         | 70.0           | 83.2           | 82.0           | 90.0           | 90.0           | 93.0           | 94.0           |                |
| United Kingdom.....                | 110.1          | 81.2           | 88.0           | 89.0           | 92.7           | 98.7           | 101.5          |                |
| Yugoslavia.....                    | 34.7           | 30.0           | 33.6           | 34.3           | 35.0           | 37.0           | 38.0           |                |
| Total Western Europe.....          | 378.8          | 343.6          | 362.0          | 374.9          | 386.5          | 401.8          | 411.0          |                |
| Other Europe 4/.....               | 104.5          | 82.2           | 86.3           | 89.9           | 92.2           | 92.9           | 93.6           |                |
| Estimated total                    |                |                |                |                |                |                |                |                |
| (excl. U.S.S.R.) 5/6/.....         | 488.3          | 425.8          | 448.3          | 464.8          | 479.3          | 494.1          | 503.3          |                |
| U.S.S.R. (Europe and Asia) 5/..... | 310.2          | 311.5          | -              | 350.0          | 380.0          | 400.0          | 400.0          |                |



| ASIA                    |       |       |       |       |       |       |       |  |  |
|-------------------------|-------|-------|-------|-------|-------|-------|-------|--|--|
| Iran.....               | 36.3  | 29.3  | 24.7  | 32.6  | 34.2  | 36.6  | 37.5  |  |  |
| Iraq.....               | 21.6  | 27.3  | 26.7  | 28.7  | 30.0  | 32.0  | 32.0  |  |  |
| Lebanon.....            | -     | -     | -     | -     | 2.4   | 2.5   | 2.5   |  |  |
| Syria.....              | 10.7  | 12.2  | 10.0  | 13.0  | 15.0  | 13.0  | 16.0  |  |  |
| Turkey.....             | 67.7  | 70.7  | 70.9  | 67.2  | 72.9  | 77.9  | 80.0  |  |  |
| Afghanistan.....        | 15.0  | 16.4  | -     | -     | -     | -     | -     |  |  |
| China 7/.....           | 88.0  | 75.0  | -     | -     | -     | -     | -     |  |  |
| India.....              | 72.9  | 51.8  | 46.2  | 50.5  | 52.0  | 58.0  | 60.0  |  |  |
| Japan.....              | -     | -     | 2.2   | 2.6   | 3.2   | 4.5   | 5.3   |  |  |
| Pakistan.....           | -     | 26.4  | 27.0  | 27.8  | 27.2  | 30.0  | 31.0  |  |  |
| Estimated total 2/..... | 344.2 | 355.6 | 346.4 | 362.3 | 374.8 | 392.5 | 402.3 |  |  |

| SOUTH AMERICA            |       |       |       |       |       |       |       |  |  |
|--------------------------|-------|-------|-------|-------|-------|-------|-------|--|--|
| Argentina.....           | 441.0 | 449.8 | 415.0 | 430.0 | 420.0 | 407.0 | 420.0 |  |  |
| Brazil.....              | 35.5  | 45.8  | 48.5  | 47.4  | 51.8  | 46.7  | 50.0  |  |  |
| Chile.....               | 32.6  | 42.3  | 46.3  | 41.9  | 41.9  | 44.1  | 45.0  |  |  |
| Falkland Islands.....    | 4.0   | 4.2   | 4.3   | 4.4   | 4.2   | 5.0   | 5.0   |  |  |
| Peru.....                | 19.4  | 17.7  | 18.7  | 19.2  | 20.5  | 20.5  | 20.5  |  |  |
| Uruguay.....             | 126.2 | 162.9 | 163.3 | 185.0 | 187.4 | 190.0 | 195.0 |  |  |
| Estimated total 10/..... | 638.9 | 735.4 | 707.7 | 739.5 | 737.4 | 725.2 | 747.4 |  |  |

| AFRICA                         |       |       |       |       |       |       |       |  |  |
|--------------------------------|-------|-------|-------|-------|-------|-------|-------|--|--|
| Algeria.....                   | 22.6  | 16.2  | 15.6  | 19.6  | 22.8  | 28.0  | 29.0  |  |  |
| Egypt.....                     | 7.5   | 6.7   | 6.4   | 8.0   | 6.6   | 7.0   | 8.0   |  |  |
| French Morocco.....            | 35.1  | 27.2  | 30.0  | 33.1  | 35.3  | 36.0  | 30.2  |  |  |
| Tunisia.....                   | 12.0  | 9.9   | 8.0   | 11.0  | 12.0  | 11.0  | 12.0  |  |  |
| Union of South Africa 11/..... | 252.3 | 215.9 | 217.5 | 227.5 | 240.0 | 256.8 | 268.0 |  |  |
| Estimated total 12/.....       | 336.8 | 281.9 | 283.0 | 304.6 | 323.5 | 345.6 | 354.0 |  |  |

| OCEANIA                        |         |         |         |         |         |         |         |  |  |
|--------------------------------|---------|---------|---------|---------|---------|---------|---------|--|--|
| Australia.....                 | 1,051.9 | 1,050.0 | 1,110.0 | 1,117.5 | 1,080.0 | 1,280.0 | 1,310.0 |  |  |
| New Zealand.....               | 313.8   | 371.6   | 390.0   | 390.0   | 406.7   | 418.0   | 421.0   |  |  |
| Total.....                     | 1,365.9 | 1,421.7 | 1,500.1 | 1,507.6 | 1,486.8 | 1,698.1 | 2,085.1 |  |  |
| Estimated world total 13/..... | 3,930.0 | 3,840.0 | 3,890.0 | 4,000.0 | 4,050.0 | 4,330.0 | 4,410.0 |  |  |

1/ For summary purposes wool produced mostly in the spring in the Northern Hemisphere is combined with that produced in the season beginning July 1 or October 1 of the same year in the Southern Hemisphere. Pulled wool is included for most countries at its greasy equivalent. 2/ Preliminary. 3/ Includes estimates for Newfoundland, Netherland West Indies, Guatemala and El Salvador. 4/ Includes the Iron Curtain Countries, (Albania, Bulgaria, Czechoslovakia, Hungary, Poland, Rumania and Eastern Germany). 5/ Based on present boundaries. 6/ Includes estimates for countries producing 2 million pounds or less, namely Belgium, Denmark, Iceland, Sweden and Switzerland. 7/ Includes China Proper (22 provinces) Manchuria, Jehol and Sinkiang (Turkestan). 8/ Includes Pakistan. 9/ Includes estimates for Afghanistan, Cyprus, Palestine, Transjordan, Outer Mongolia, Tibet, Nepal and China. 10/ Includes relatively small production in Bolivia, Colombia, Ecuador, Paraguay, and Venezuela. 11/ Union of South Africa, Union Protectorate and South West Africa. 12/ Includes estimates for Kenya, French West Africa and Togo. 13/ Rounded to tens of millions.

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On a clean basis world output in 1953 totaled about 2,540 million pounds of which 2,080 million pounds are apparel type and 460 million pounds are the coarse or carpet type.

Output in all of the main producing countries is expected to be slightly above last season which as indicated was at a record level largely as a result of increase in output in Australia, made possible by the sharp reduction in rabbit numbers because of the disease, myxomatosis, and the subsequent improvement in the quality and quantity of pastures. In that season wool production in Australia went up as a result of increased yields per fleece by nearly 20 percent, while sheep numbers went up 4 percent. It is thought that in the years ahead the rabbit problem will be kept under control and sheep numbers will continue their increase, to the extent of pasture available, while yields will return to a more normal level.

Increases are noted in New Zealand for the past 3 seasons and production is now considerably above the prewar and war year averages. Output in the Union of South Africa in 1952 was above prewar for the first time since World War II and another substantial increase is estimated for the current clip. Increases in that country have been made possible by generally better feed and weather conditions.

Small increases are expected in Argentina and Uruguay where competition with beef is keen. Production in Argentina is now above prewar but still under the level reached in the 1946-50 period. Substantial increases have been made in Uruguay over prewar levels as a result of increased carrying capacity of the land through improved management.

World wool prices strengthened steadily from the low point in April 1952 until May 1953 and production was encouraged. At the same time consumption and forward buying by mills was stepped up and in the past 15 months the trade has absorbed for the most part the large 1952 production plus the carry-over from 1951 in South America. The principal exceptions being the accumulation of about 100 million pounds under the United States price support operations and some additional buildup in the United Kingdom strategic stockpile.

It now appears that world consumption dropped off sharply, however, in the third quarter of 1953 after having increased each 3 month period since the final quarter of 1951, making it doubtful that the current large clip will be entirely marketed at the prices now prevailing.

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This is one of a series of regularly scheduled reports on world agricultural production approved by the Foreign Agricultural Service Committee on Foreign Crop and Livestock Statistics. It is based in part upon U. S. Foreign Service reports.